Tax Online Web Filing Application User Manual

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Welcome

This website will allow you to complete and submit your New Mexico Tax Returns online for the selected OGRID. You must be granted access to file your tax returns by the application administrator. You will access this application form the New Mexico Unified Online Filing Application.

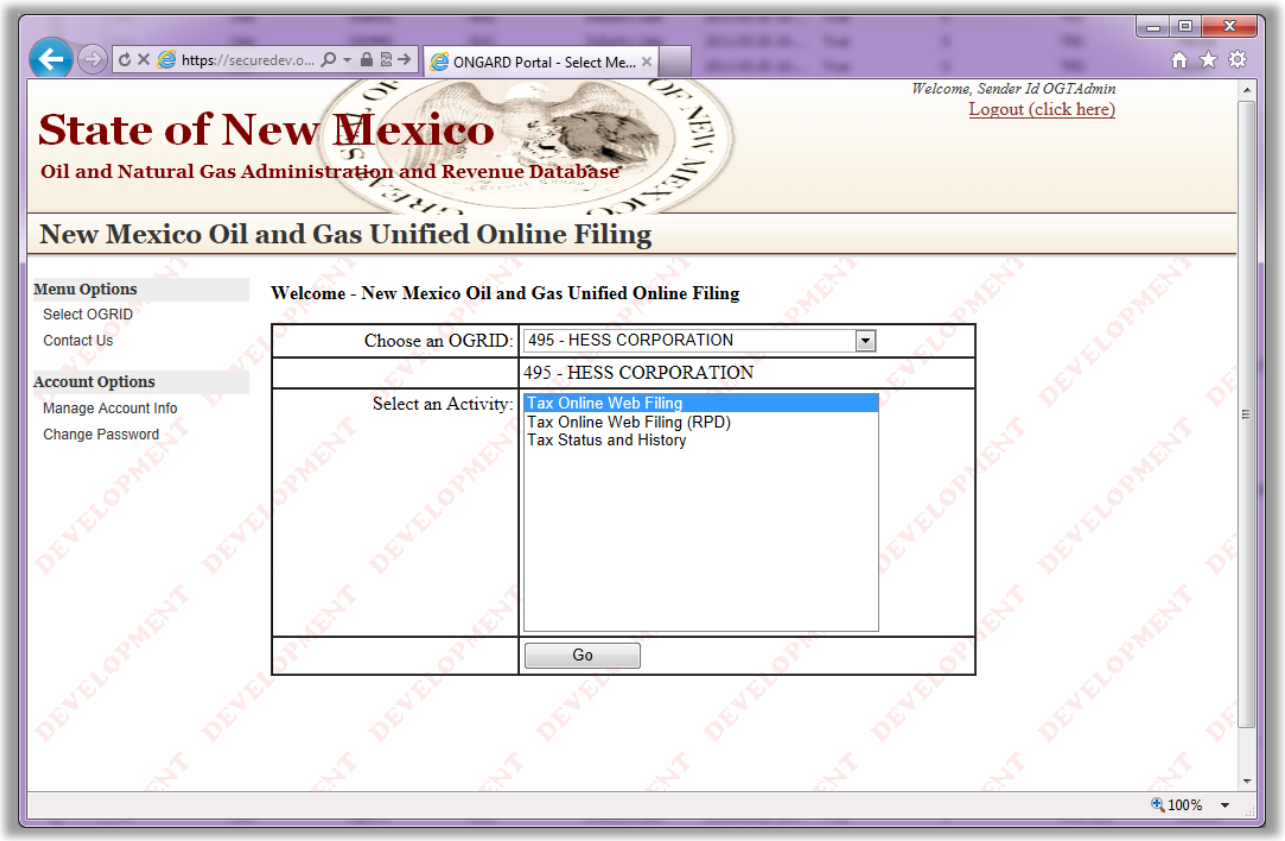
The application navigation is divided into three categories, the “Return Options”, “Support” and “ONGARD Portal”. The navigation is located on the left hand side of the screen. These options are available at any time while using the filing services.

The “Tax Online Web Filing” menu option is a link you can use to submit your current and amended tax data. Remitters using this link generally file less than 40 lines of detail. Remitters may also pay assessments as well as apply a credit invoice all within the same return.

Unified Online Filing

To access the Tax Online Filing application:

1. Click “Select OGRID” from the left-hand menu.
2. Select the appropriate OGRID from the dropdown list
3. Select “Tax Online Web Filing” option from the list of activities.
4. Click on the “Go” button, you will be directed to the Tax Online Filing application.



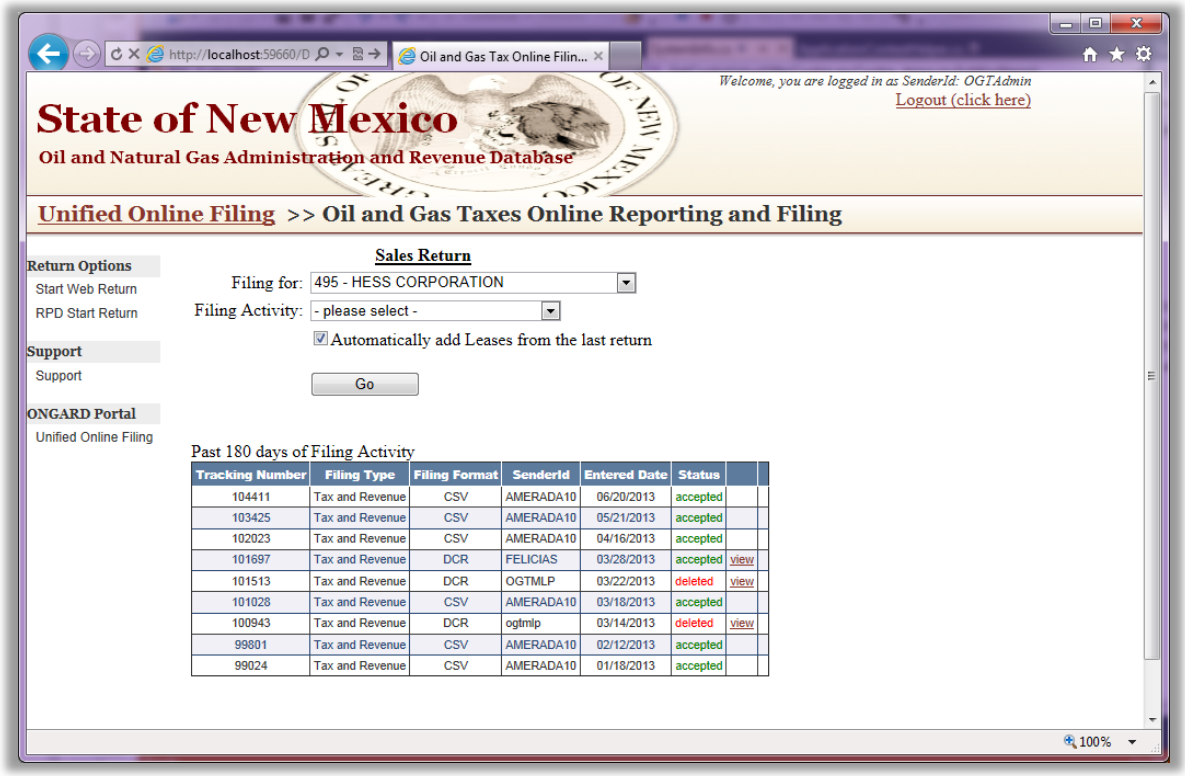
Return Options

Use the "Start Web Return" or if you are a RPD user, "RPD Start Return" to start a new Tax Web Return. Select the appropriate OGRID and if a return is not currently submitted, you can choose the filing activity and choose to include the auto add the PUNs from the last return.

The "Past 180 of Filing Activity" are displayed at the bottom of the page. If the return has already been started select the option to the right of the desired return. Your choices are dependent on the status of the return, Update, Delete, View. Only un-submitted returns can be deleted.

Start Web Return

1. Using the drop down button select the current month's sales period. If you are filing only amended return or filing for prior periods not shown on the filing activity listing, select the most recent sales period as your current month.
2. Check the automatically add Leases from the last return button to have a listing of all prior reporting Pun/lease number inserted in the current month's reporting period screen/report.
3. "Go": Click the "Go" button to start filing.
4. Note this screen will also allow you to view the most recent filing activity for this OGRID.


Oil and Gas Tax Online Filin...
Welcome, you are logged in as SenderId: OGTAdmin
Logout (click here)
State of New Mexico
Oil and Natural Gas Administration and Revenue Database
Unified Online Filing >> Oil and Gas Taxes Online Reporting and Filing
Return Options
Start Web Return
RPD Start Return
Support
Support
ONGARD Portal
Unified Online Filing
Sales Return
Filing for: 495 - HESS CORPORATION
Filing Activity: - please select -
Automatically add Leases from the last return
Go
Past 180 days of Filing Activity
Tracking Number | Filing Type | Filing Format | SenderId | Entered Date | Status
104411 | Tax and Revenue | CSV | AMERADA10 | 06/20/2013 | accepted
103425 | Tax and Revenue | CSV | AMERADA10 | 05/21/2013 | accepted
102023 | Tax and Revenue | CSV | AMERADA10 | 04/16/2013 | accepted
101697 | Tax and Revenue | DCR | FELICIAS | 03/28/2013 | accepted | view
101513 | Tax and Revenue | DCR | OGTMLP | 03/22/2013 | deleted | view
101028 | Tax and Revenue | CSV | AMERADA10 | 03/18/2013 | accepted
100943 | Tax and Revenue | DCR | ogtmlp | 03/14/2013 | deleted | view
99801 | Tax and Revenue | CSV | AMERADA10 | 02/12/2013 | accepted
99024 | Tax and Revenue | CSV | AMERADA10 | 01/18/2013 | accepted
100%

Current Month Details Tab

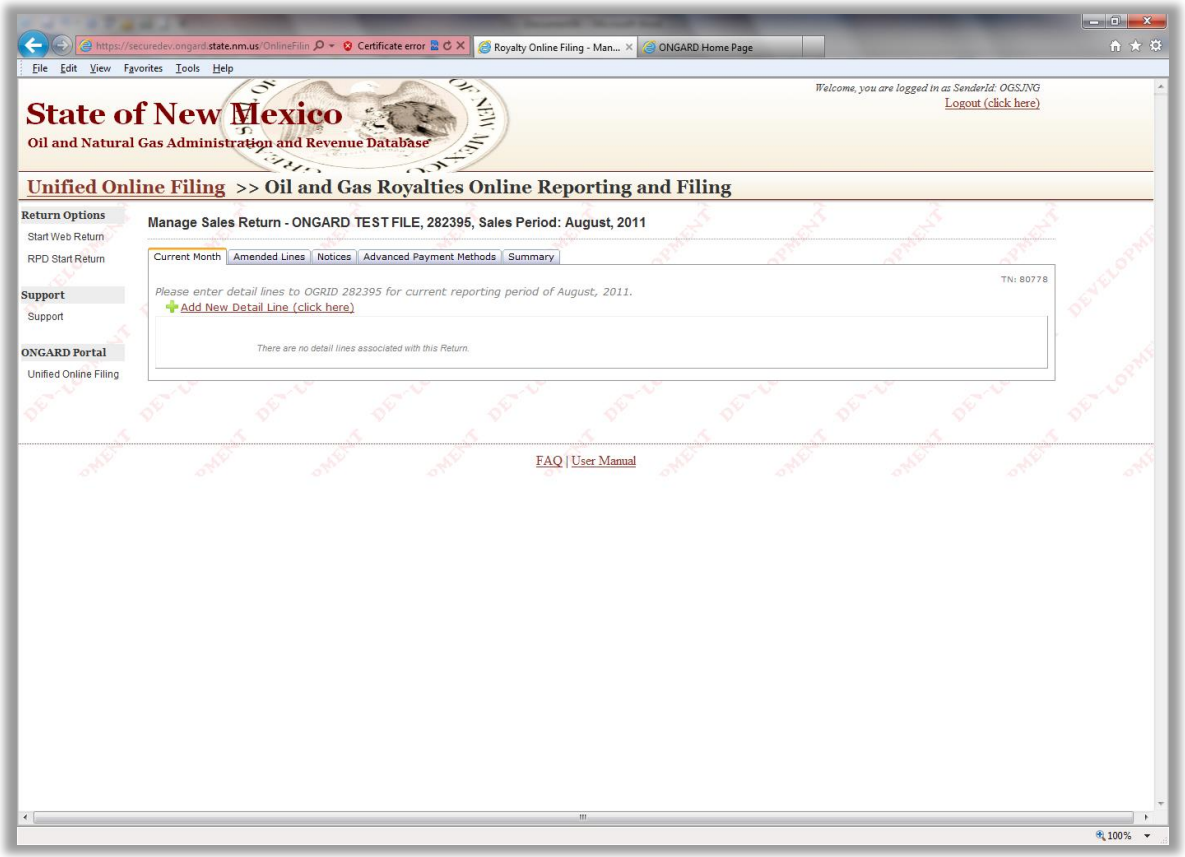
This is the default/first page to each tax return and you may begin your return by filing tax reporting for the previously selected current month sales period.

Use the "Add New Detail Line (click here)" link to add a new detail line, or click the "update" link next to the line to update an entry. To remove a line, click the "delete" link next to the line.

Add New Detail Line (click here): Click here to create and enter a new detail line. Continue this process until all detail line entries are entered.

Edit Detail Data: User has the option to change the detail line entry by clicking the "Edit" link located at the end of the entered line entry. You will be directed back to the working box allowing you to make any required changes.

Delete Detail Data: Click the "Delete" link to delete the entire line entry.


State of New Mexico
Oil and Natural Gas Administration and Revenue Database
Welcome, you are logged in as SenderId: OGSJNG
Logout (click here)
Unified Online Filing >> Oil and Gas Royalties Online Reporting and Filing
Return Options
Start Web Return
RPD Start Return
Support
Support
ONGARD Portal
Unified Online Filing
Manage Sales Return - ONGARD TEST FILE, 282395, Sales Period: August, 2011
Current Month
Amended Lines
Notices
Advanced Payment Methods
Summary
Please enter detail lines to OGRID 282395 for current reporting period of August, 2011.
Add New Detail Line (click here)
There are no detail lines associated with this Return.
FAQ | User Manual

Detail Data Description:

Pun – Enter the PUN number as assigned by the State of New Mexico. The PUN number must be entered for each line entry

Suffix – Enter the Lease number as assigned by the State of New Mexico. The lease number must be entered for each line entry.

Product Code – The is of the product reporting on, use the drop-down button Select the product code

Affiliation Code – Use the dropdown list to note of there is any affiliation with the processing company and your company.

Special Tax Rate Code – This field is for selecting a special tax rate code. If there are no active codes, then the field is disabled.

Trans. Code – Use the drop-down button Select the transaction code

Volume (BBL/MCF) – Report oil and condensate to the nearest whole barrel. Report Natural Gas to the nearest MCF metered at the wellhead at 15.025 PSIA at 60 degrees Fahrenheit for unprocessed gas. For processed gas, report to the nearest MCF for Residue Gas and the equivalent MCF of the reported Natural Gas liquids.

Gross Proceeds – Enter to the nearest whole dollar the value/actual price received for the products on an entitlement or take basis for the production unit property before deductions.

Transport Deductions – Enter to the nearest whole dollar allowable transportation costs.

Processing Deductions – Enter to the nearest whole dollar allowable processing costs.

Royalty Deductions – Enter to the nearest whole dollar allowable royalty costs.

Tax Due – The tax due amount will be calculated by the system by after "Clicking" on the Save button

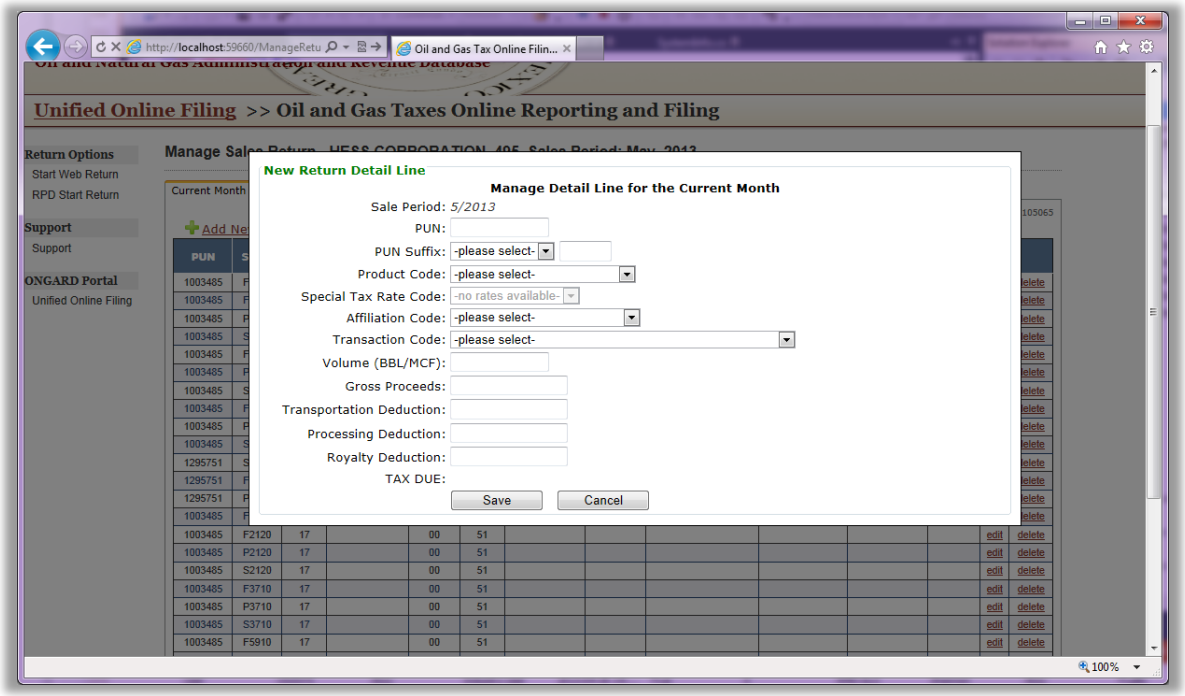
Edit Update Current Reporting Period Data

You are now ready to begin entering the tax reporting details in the working box which has now appeared on the screen. You will notice the Sales Period is encoded as selected

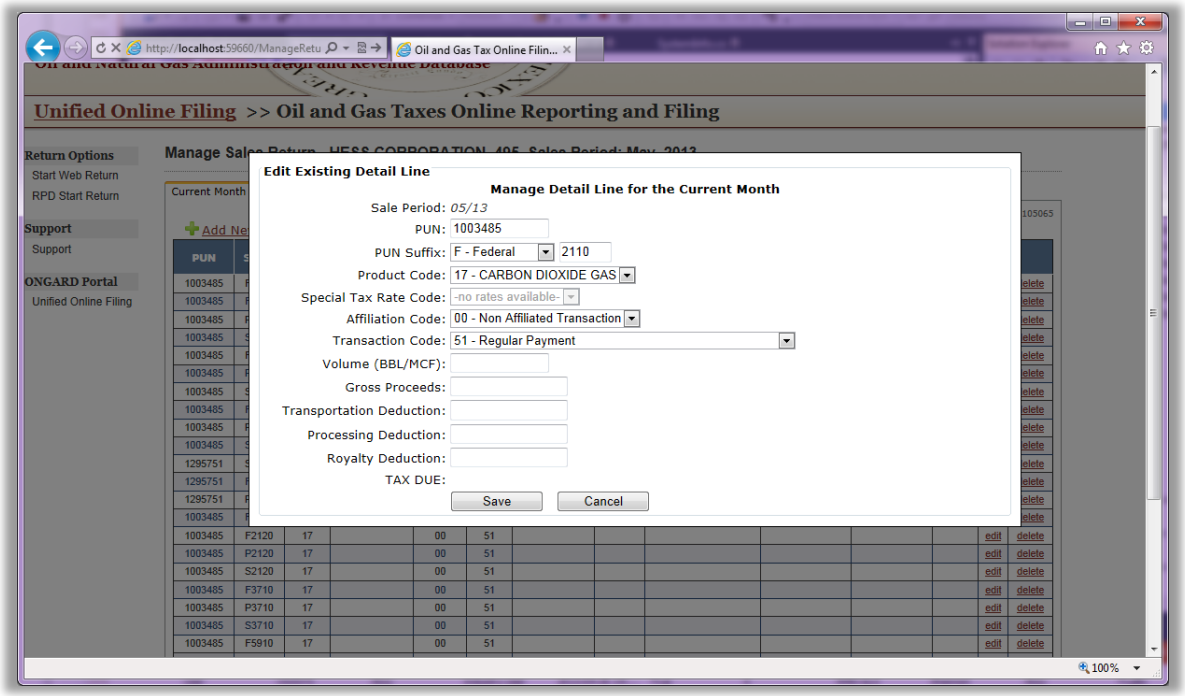
in the beginning of this process. If you selected to enter all prior detail lines you can edit a row and enter the deduction data.

Click the “Save” button to save this line of entry and calculate the tax amount due

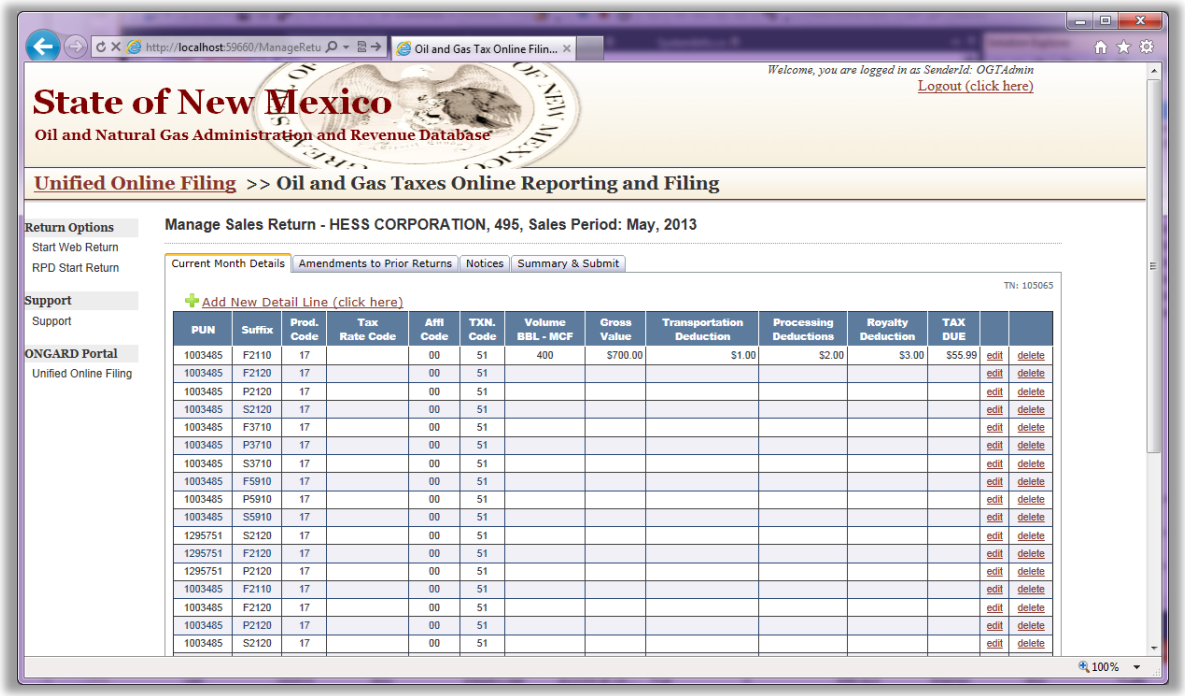
Use the “Cancel” button to cancel this line of entry.



Screenshot of a new current sales period line entry.



Screenshot of a partially completed detail line.


State of New Mexico
Oil and Natural Gas Administration and Revenue Database
Welcome, you are logged in as SenderId: OGTAdmin
Logout (click here)
Unified Online Filing >> Oil and Gas Taxes Online Reporting and Filing
Return Options
Start Web Return
RPD Start Return
Support
Support
ONGARD Portal
Unified Online Filing
Manage Sales Return - HESS CORPORATION, 495, Sales Period: May, 2013
Current Month Details
Amendments to Prior Returns
Notices
Summary & Submit
TN: 105065
Add New Detail Line (click here)

PUN	Suffix	Prod. Code	Tax Rate Code	Affi Code	TXN. Code	Volume BBL - MCF	Gross Value	Transportation Deduction	Processing Deductions	Royalty Deduction	TAX DUE		
1003485	F2110	17		00	51	400	$700.00	$1.00	$2.00	$3.00	$55.99	edit	delete
1003485	F2120	17		00	51							edit	delete
1003485	P2120	17		00	51							edit	delete
1003485	S2120	17		00	51							edit	delete
1003485	F3710	17		00	51							edit	delete
1003485	P3710	17		00	51							edit	delete
1003485	S3710	17		00	51							edit	delete
1003485	F5910	17		00	51							edit	delete
1003485	P5910	17		00	51							edit	delete
1003485	S5910	17		00	51							edit	delete
1295751	S2120	17		00	51							edit	delete
1295751	F2120	17		00	51							edit	delete
1295751	P2120	17		00	51							edit	delete
1003485	F2110	17		00	51							edit	delete
1003485	F2120	17		00	51							edit	delete
1003485	P2120	17		00	51							edit	delete
1003485	S2120	17		00	51							edit	delete

Screenshot showing the current sales period detail lines with one entry.

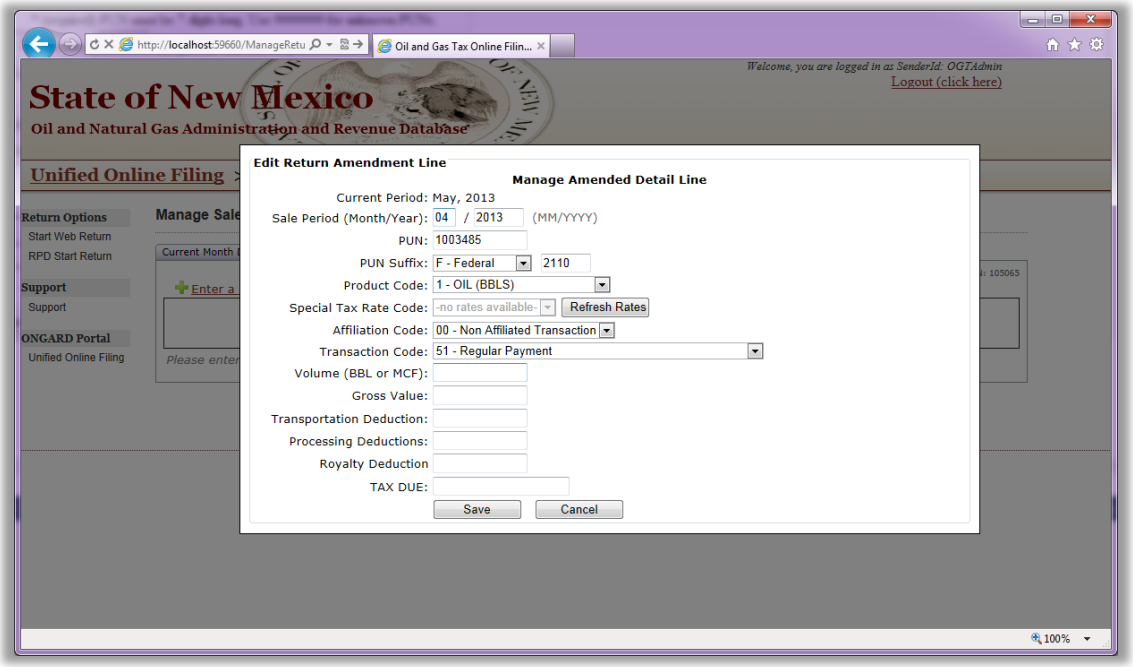
Amendments to Prior Returns Tab

Click the "Enter a New Amendment" link to enter a new amended line entry.

Amendments are entered in the same manner as the current month's detail lines with the following exceptions: Remitter may enter negative values and "must" enter the value in the Tax Due amount field and the Sales Period.

Oil and Gas Tax Online Filin...
Welcome, you are logged in as SenderId: OGTAdmin
Logout (click here)
State of New Mexico
Oil and Natural Gas Administration and Revenue Database
Unified Online Filing >> Oil and Gas Taxes Online Reporting and Filing
Return Options
Start Web Return
RPD Start Return
Support
Support
ONGARD Portal
Unified Online Filing
Manage Sales Return - HESS CORPORATION, 495, Sales Period: May, 2013
Current Month Details
Amendments to Prior Returns
Notices
Summary & Submit
TN: 105065
Enter a New Amendment
There are no Amendment Lines in this Return.
Please enter amendments prior to the reporting period of May, 2013.
FAQ | User Manual
100%

Amended lines tab, with no lines currently entered.


State of New Mexico
Oil and Natural Gas Administration and Revenue Database
Welcome, you are logged in as SenderId: OGTAdmin
Logout (click here)
Unified Online Filing
Edit Return Amendment Line
Manage Amended Detail Line
Current Period: May, 2013
Sale Period (Month/Year): 04 / 2013 (MM/YYYY)
PUN: 1003485
PUN Suffix: F - Federal 2110
Product Code: 1 - OIL (BBLS)
Special Tax Rate Code: -no rates available- Refresh Rates
Affiliation Code: 00 - Non Affiliated Transaction
Transaction Code: 51 - Regular Payment
Volume (BBL or MCF):
Gross Value:
Transportation Deduction:
Processing Deductions:
Royalty Deduction
TAX DUE:
Save
Cancel

Screenshot showing the edit screen for the amendment lines.

"Edit" column: Click this field to edit the amended line entry
Save: Click on this save button when completed.
Note: if the Pun/lease combination is invalid the line entry will be highlighted in Red.

State of New Mexico
Oil and Natural Gas Administration and Revenue Database
Welcome, you are logged in as SenderId: OGTAdmin
Logout (click here)
Unified Online Filing >> Oil and Gas Taxes Online Reporting and Filing
Manage Sales Return - HESS CORPORATION, 495, Sales Period: May, 2013
Current Month Details
Amendments to Prior Returns
Notices
Summary & Submit
Enter a New Amendment
Sale Period (MM/YYYY) | PUN | Suffix | Prod. Code | Tax Rate Code | Affl Code | TXN. Code | Volume BBL - MCF | Gross Value | Transportation Deduction | Processing Deductions | Royalty Deduction | TAX DUE
04/13 | 1003485 | F2110 | 17 | | 00 | 51 | 100 | $10.00 | $1.00 | $1.00 | $1.00 | ($99.00) | edit | delete
Totals: | 100 | $10.00 | $1.00 | $1.00 | $1.00 | ($99.00)
One amendments line has been entered for the Return.
FAQ | User Manual

Screenshot showing an amended detail line with an invalid Pun/Lease combination.

Notices Tab

The table allows you to take a credit, or pay an assessment. You can add a Notice to the Return search for the notice by number. The notice must be associated with your OGRID.

Notice Reporting

To add a new notice, search for the notice by the invoice number. If you want to update or delete a notice use the "Edit" link or "Delete" link on the appropriate notice line in the details section.

Searching for a notice:

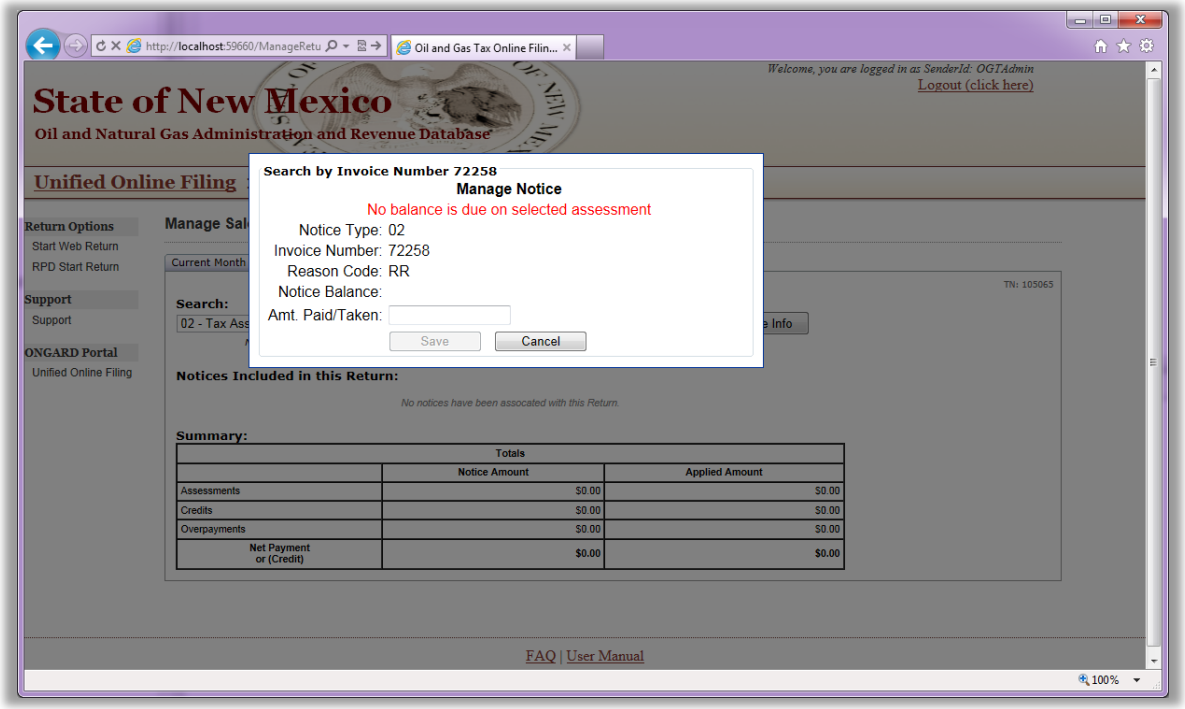
1. **Enter Invoice Number:** Notice Number (either credit or assessment notice)

2. **Click "Go":** The system will retrieve the notice detail information and It wills also prompt you with a save button.

Add or Update notice information:

Enter the amount paid or taken for the credit or assessment. Use the "Save" button to add/update the return. To cancel, click the "Cancel" button and nothing will be saved.

Screen-shot of Notice summary screen.



Screenshot showing a notice with no outstanding balance.

Summary & Submit Tab

This is the final stage in completing and filing your tax return. The system has automatically summarized all recorded details to the summary report. Review the details and insure all values are as expected, otherwise go back to the required process and make corrections as deemed necessary.

Oil and Gas Taxes Summary

Complete the summary details to finish your tax return:

Operator or Purchaser: Using this drop down button select your type of operator or purchaser.

Final Sales Return: Using the drop-down box 'select yes" if this is your final return to the state of New Mexico. No, leave this default indicator as is for all other returns.

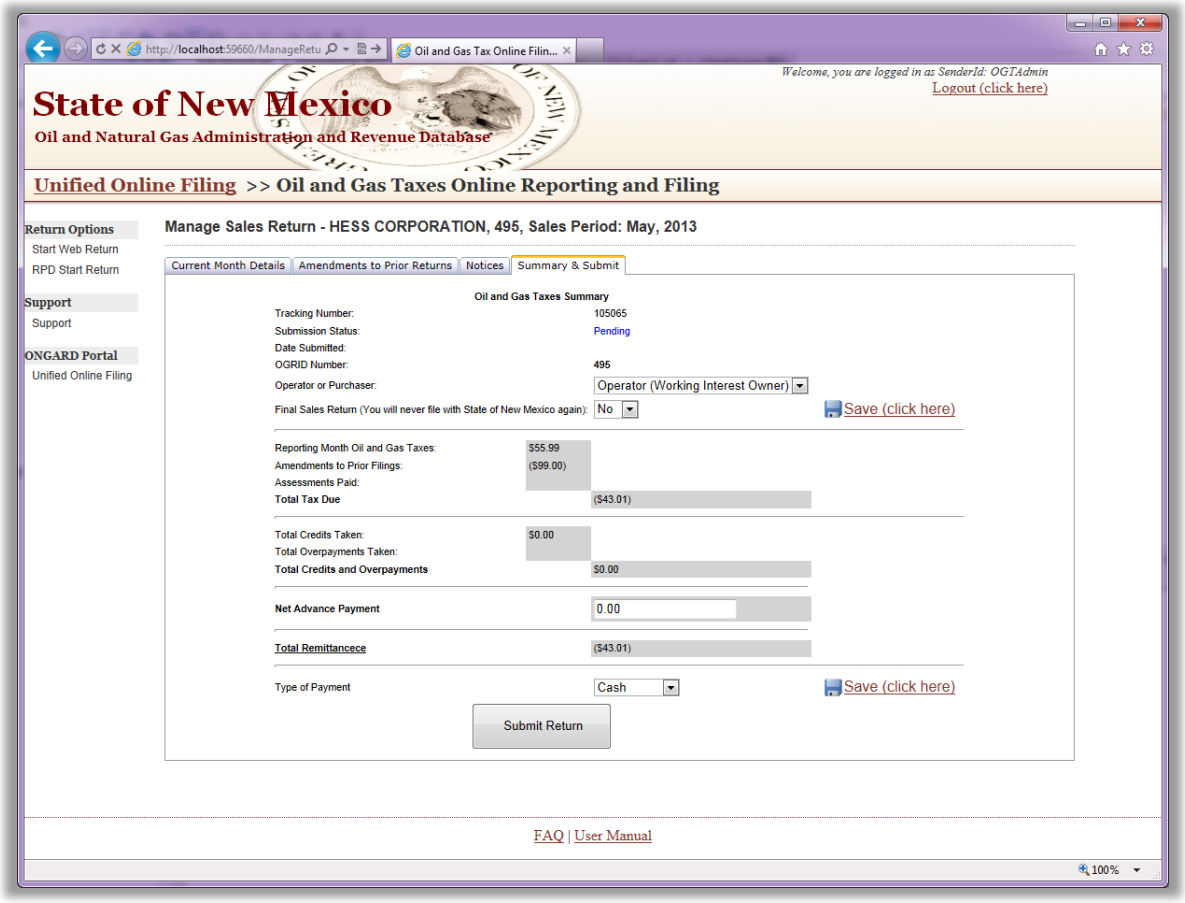
Net Advanced Payment: Enter the amount of advanced payment you sent (optional, default is zero)

Payment Type: Using this drop down button select your type of payment. If you select Check, then you are required to let us know if it is an In-state or Out of State check.

You can save your progress on this tab by using the "Save (click here)" link, which will save your changes, but not submit the return for processing. Or you can click the "Submit" button which will save your return and submit it for processing.

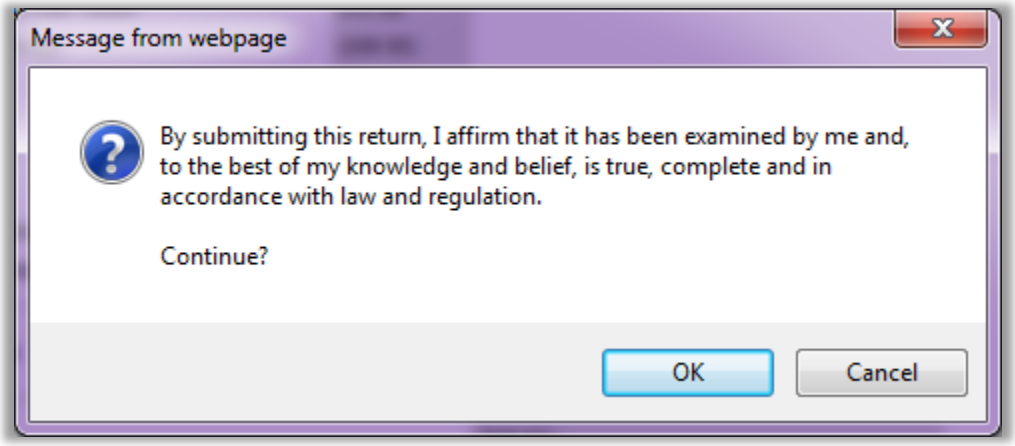
Save (click here) Link(s): Click on this message to save this return. All updates are now saved and you are ready to submit your file.

Submit Return: Click on this button to submit your tax return data.


State of New Mexico
Oil and Natural Gas Administration and Revenue Database
Welcome, you are logged in as SenderId: OGTAdmin
Logout (click here)
Unified Online Filing >> Oil and Gas Taxes Online Reporting and Filing
Return Options
Start Web Return
RPD Start Return
Support
Support
ONGARD Portal
Unified Online Filing
Manage Sales Return - HESS CORPORATION, 495, Sales Period: May, 2013
Current Month Details
Amendments to Prior Returns
Notices
Summary & Submit
Oil and Gas Taxes Summary
Tracking Number: 105065
Submission Status: Pending
Date Submitted:
OGRID Number: 495
Operator or Purchaser: Operator (Working Interest Owner)
Final Sales Return (You will never file with State of New Mexico again): No
Save (click here)
Reporting Month Oil and Gas Taxes: $55.99
Amendments to Prior Filings: ($99.00)
Assessments Paid:
Total Tax Due ($43.01)
Total Credits Taken: $0.00
Total Overpayments Taken:
Total Credits and Overpayments $0.00
Net Advance Payment 0.00
Total Remittancece ($43.01)
Type of Payment Cash
Save (click here)
Submit Return
FAQ | User Manual
100%

Summary tab with all tax summary data, pending user submission.

After clicking the submit button the application will ask you to verify the submission and verify your submission is accurate. Read the disclaimer and click **"OK"** if you agree with the message.

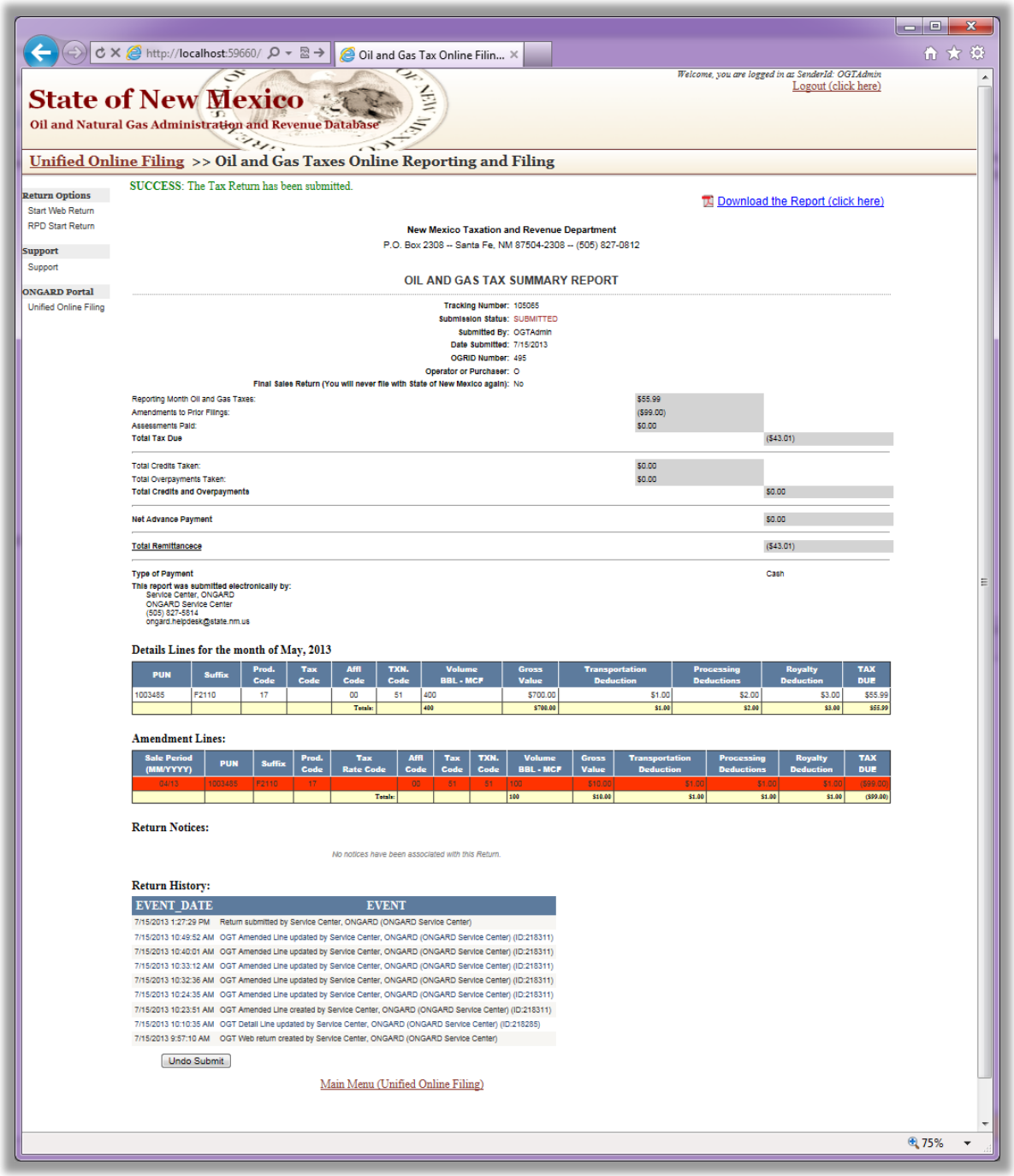

Message from webpage
By submitting this return, I affirm that it has been examined by me and, to the best of my knowledge and belief, is true, complete and in accordance with law and regulation.
Continue?
OK
Cancel

Confirmation Dialog

You will be directed to a new online summary screen. This will summarize the return; you cannot edit the return unless it is un-submitted.

Completed Return Summary

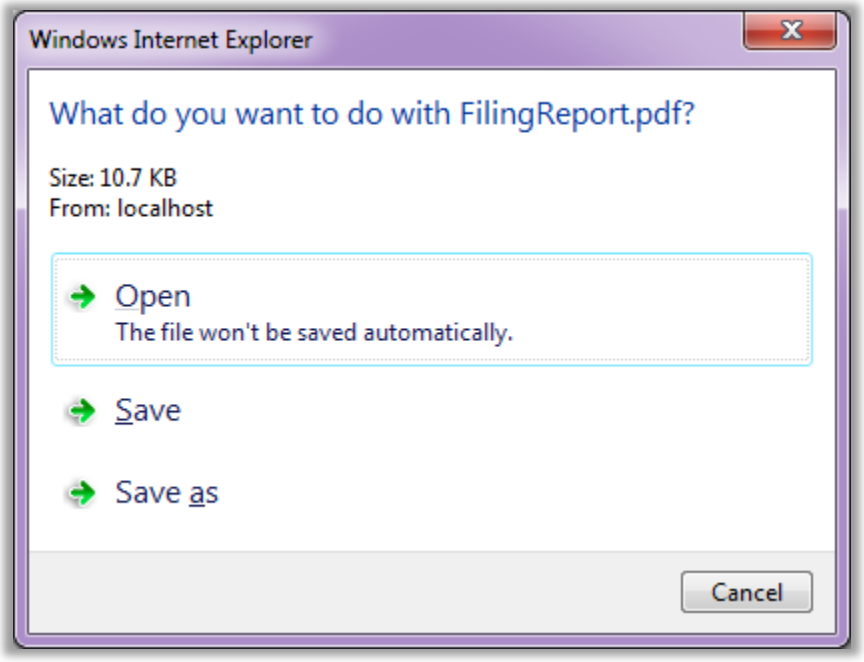
After clicking the Submit return button, you will be directed to a complete return summary screen. From this screen you can View the summary report, Undo the return submission, delete the un-submitted return or return to the unified online filing application.


http://localhost:59660/
Oil and Gas Tax Online Filin...
Welcome, you are logged in as SenderId: OGTAdmin
Logout (click here)
State of New Mexico
Oil and Natural Gas Administration and Revenue Database
Unified Online Filing >> Oil and Gas Taxes Online Reporting and Filing
Return Options
Start Web Return
RPD Start Return
Support
Support
ONGARD Portal
Unified Online Filing
SUCCESS: The Tax Return has been submitted.
Download the Report (click here)
New Mexico Taxation and Revenue Department
P.O. Box 2308 -- Santa Fe, NM 87504-2308 -- (505) 827-0812
OIL AND GAS TAX SUMMARY REPORT
Tracking Number: 105065
Submission Status: SUBMITTED
Submitted By: OGTAdmin
Date Submitted: 7/15/2013
OGRID Number: 495
Operator or Purchaser: O
Final Sales Return (You will never file with State of New Mexico again): No
Reporting Month Oil and Gas Taxes: $55.99
Amendments to Prior Filings: ($99.00)
Assessments Paid: $0.00
Total Tax Due ($43.01)
Total Credits Taken: $0.00
Total Overpayments Taken: $0.00
Total Credits and Overpayments $0.00
Net Advance Payment $0.00
Total Remittancace ($43.01)
Type of Payment Cash
This report was submitted electronically by:
Service Center, ONGARD
ONGARD Service Center
(505) 827-5814
ongard.helpdesk@state.nm.us
Details Lines for the month of May, 2013
PUN | Suffix | Prod. Code | Tax Code | Affl Code | TXN. Code | Volume BBL - MCF | Gross Value | Transportation Deduction | Processing Deductions | Royalty Deduction | TAX DUE
1003485 | F2110 | 17 | | 00 | 51 | 400 | $700.00 | $1.00 | $2.00 | $3.00 | $55.99
Totals: 400 $700.00 $1.00 $2.00 $3.00 $55.99
Amendment Lines:
Sale Period (MM/YYYY) | PUN | Suffix | Prod. Code | Tax Rate Code | Affl Code | Tax Code | TXN. Code | Volume BBL - MCF | Gross Value | Transportation Deduction | Processing Deductions | Royalty Deduction | TAX DUE
04/13 | 1003485 | F2110 | 17 | | 00 | 51 | 51 | 100 | $10.00 | $1.00 | $1.00 | $1.00 | ($99.00)
Totals: 100 $10.00 $1.00 $1.00 $1.00 ($99.00)
Return Notices:
No notices have been associated with this Return.
Return History:
EVENT_DATE | EVENT
7/15/2013 1:27:29 PM Return submitted by Service Center, ONGARD (ONGARD Service Center)
7/15/2013 10:49:52 AM OGT Amended Line updated by Service Center, ONGARD (ONGARD Service Center) (ID:218311)
7/15/2013 10:40:01 AM OGT Amended Line updated by Service Center, ONGARD (ONGARD Service Center) (ID:218311)
7/15/2013 10:33:12 AM OGT Amended Line updated by Service Center, ONGARD (ONGARD Service Center) (ID:218311)
7/15/2013 10:32:36 AM OGT Amended Line updated by Service Center, ONGARD (ONGARD Service Center) (ID:218311)
7/15/2013 10:24:35 AM OGT Amended Line updated by Service Center, ONGARD (ONGARD Service Center) (ID:218311)
7/15/2013 10:23:51 AM OGT Amended Line created by Service Center, ONGARD (ONGARD Service Center) (ID:218311)
7/15/2013 10:10:35 AM OGT Detail Line updated by Service Center, ONGARD (ONGARD Service Center) (ID:218285)
7/15/2013 9:57:10 AM OGT Web return created by Service Center, ONGARD (ONGARD Service Center)
Undo Submit
Main Menu (Unified Online Filing)
75%

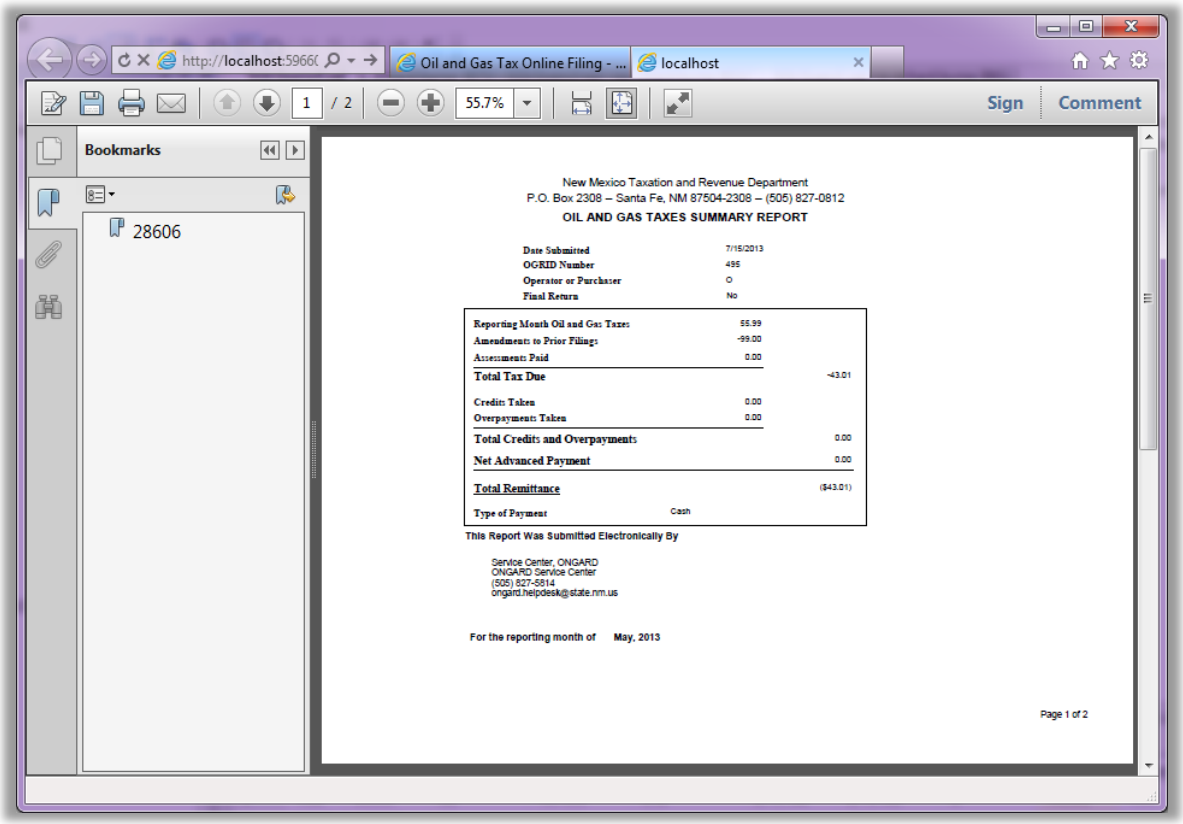
Screenshot of the Tax Return Summary.

Download the Report (click here)

Clicking the "Download the Report" link at the top of the online summary will casue a dialog box to open asking you how you would like to manage the file, you can open it, save it or save it as a new name to your computer.



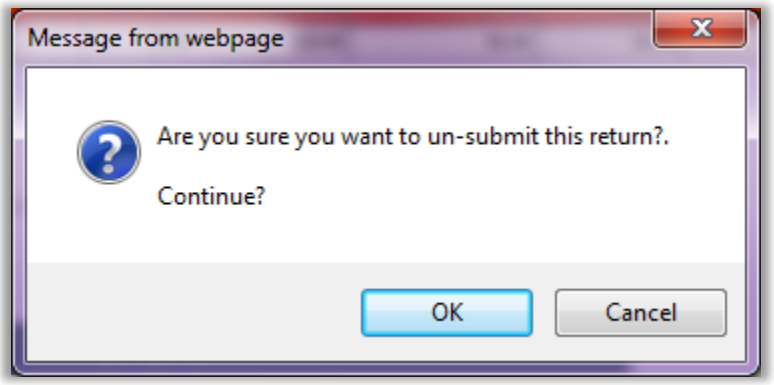
Open or save dialog for PDF report of tax return.



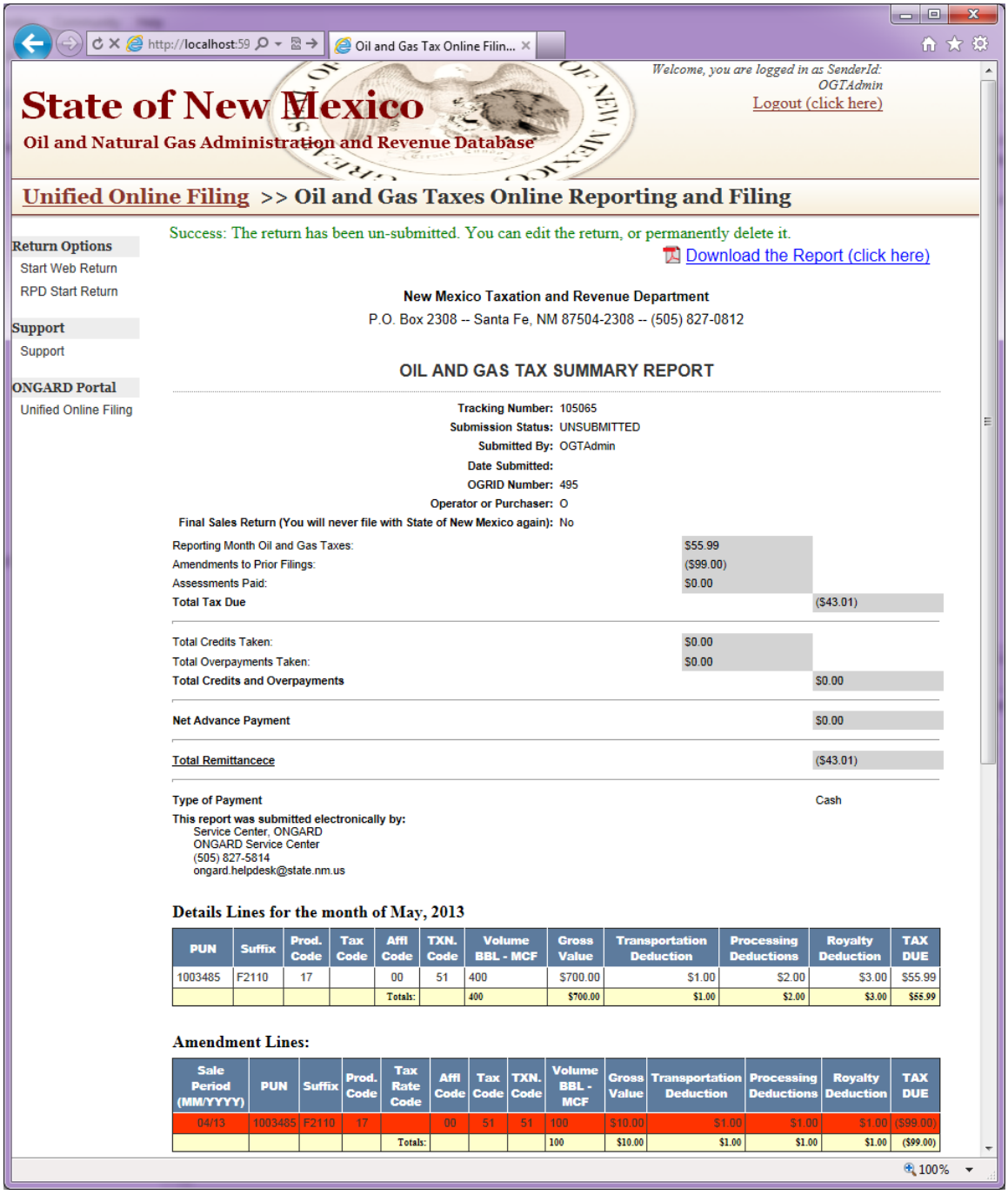
Screenshot of the PDF report opened from the internet. Adobe Acrobat is required to view reports.

Undo Submit

The "Undo Submit" button will reverse submission as long as the return has not been uploaded by the ONGARD upload service center. Users generally have 15 minutes before the file is uploaded; uploads begin at **1:30 pm MST** and continue in 15 minute intervals.



Undo submit confirmation dialog box.


Oil and Gas Tax Online Filin...
Welcome, you are logged in as SenderId: OGTAdmin
Logout (click here)
State of New Mexico
Oil and Natural Gas Administration and Revenue Database
Unified Online Filing >> Oil and Gas Taxes Online Reporting and Filing
Return Options
Start Web Return
RPD Start Return
Support
Support
ONGARD Portal
Unified Online Filing
Success: The return has been un-submitted. You can edit the return, or permanently delete it.
Download the Report (click here)
New Mexico Taxation and Revenue Department
P.O. Box 2308 -- Santa Fe, NM 87504-2308 -- (505) 827-0812
OIL AND GAS TAX SUMMARY REPORT
Tracking Number: 105065
Submission Status: UNSUBMITTED
Submitted By: OGTAdmin
Date Submitted:
OGRID Number: 495
Operator or Purchaser: O
Final Sales Return (You will never file with State of New Mexico again): No
Reporting Month Oil and Gas Taxes: $55.99
Amendments to Prior Filings: ($99.00)
Assessments Paid: $0.00
Total Tax Due ($43.01)
Total Credits Taken: $0.00
Total Overpayments Taken: $0.00
Total Credits and Overpayments $0.00
Net Advance Payment $0.00
Total Remittancece ($43.01)
Type of Payment Cash
This report was submitted electronically by:
Service Center, ONGARD
ONGARD Service Center
(505) 827-5814
ongard.helpdesk@state.nm.us
Details Lines for the month of May, 2013
PUN Suffix Prod. Code Tax Code Affl Code TXN. Code Volume BBL - MCF Gross Value Transportation Deduction Processing Deductions Royalty Deduction TAX DUE
1003485 F2110 17 00 51 400 $700.00 $1.00 $2.00 $3.00 $55.99
Totals: 400 $700.00 $1.00 $2.00 $3.00 $55.99
Amendment Lines:
Sale Period (MM/YYYY) PUN Suffix Prod. Code Tax Rate Code Affl Code Tax Code TXN. Code Volume BBL - MCF Gross Value Transportation Deduction Processing Deductions Royalty Deduction TAX DUE
04/13 1003485 F2110 17 00 51 51 100 $10.00 $1.00 $1.00 $1.00 ($99.00)
Totals: 100 $10.00 $1.00 $1.00 $1.00 ($99.00)
100%

Tax return has been un-submitted, it can be edited again.

Delete Return

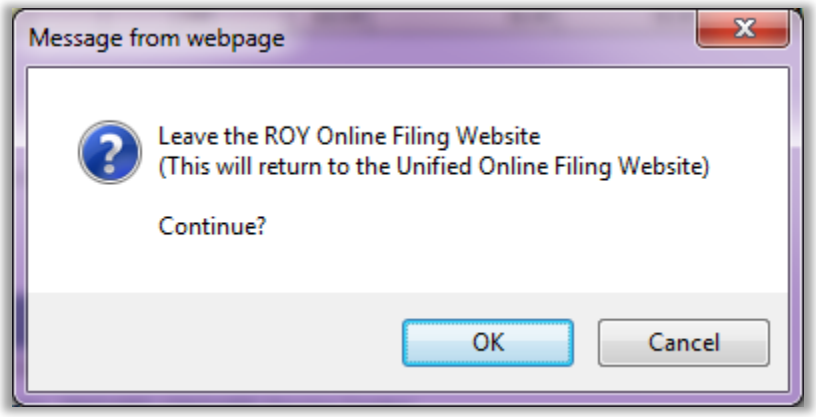
To delete a return it must be un-submitted and then you will have a button on the bottom of the summary to delete the return. You cannot delete a return that has been submitted and accepted by ONGARD, use the contact page to speak with and agency representative.

Edit Return

This button shows when the return is not submitted, and will allow you to edit the return.

Main Menu (Unified Online Filing)

The main menu link at the bottom of the summary will take you back to the Unified Online Filing portal, where you can select a different filing/reporting function.



Support

The "Support" menu option will open the agency contact list for help completing your Tax Return.

http://localhost:59
Oil and Gas Tax Online Filin...
State of New Mexico
Oil and Natural Gas Administration and Revenue Database
Welcome, you are logged in as SenderId: OGTAdmin
Logout (click here)
Unified Online Filing >> Oil and Gas Taxes Online Reporting and Filing
Return Options
Start Web Return
RPD Start Return
Support
Support
ONGARD Portal
Unified Online Filing
Support
Important Filing Informaiton:
All online filings for the current tax cycle must be submitted by midnight
Unsubmitted returns left online after that time will be automatically deleted and discarded. Please submit your return before that time.
All tax reports and associated payments are due by the 25th of each month.
Questions / Concerns:
Maureen Pasquier (Primary) (505) 827-0806 maureen.pasquier@state.nm.us
Carl Lujan (Secondary) (505) 827-0812 carl.lujan@state.nm.us
FAQ | User Manual
100%

Support page with contact information for application administrators.

ONGARD Portal

The "Unified Online Filing" menu option will return you to the Unified Online Filing application when you can access the rest of the online filing services.